Click on the hyperlink Georgia First Financials

Core Users

Enter and process financial transactions, run reports or queries, analyze financial data.

GeorgiaFIRST Financials

Follow the steps and use the login that you used to login to your PC.

https://www.usg.edu/gafirst-fin/
In order to access ePro please do not click on the GFM Shopper Access Tile – you will be a requester and you will not be able to create a requisition from the shopper tile. Please note the circle in the upper right hand corner of the screen. Once you click on it the NavBar displays. Now proceed in clicking the Navigator Link.

A new menu displays. Please note that you will be accessing eProcurement, but if you do not know the supplier ID prior to entering your ePro special request requisition you can use the ‘Suppliers’ Menu to look it up.

Let’s go to eProcurement
In order to create a requisition – click the requisition button. The following screen will appear:

You can create your favorites and templates, but for the most part you will either create a Georgia First Marketplace Requisition (supplies purchased from a statewide contract) or enter a special request requisition.

Creating Georgia First Marketplace Requisition

Click on the GAFirstMarketplace link.
Here you can punch out to the supplier website by clicking on the respective tile or search catalog items of supplier products that do not have a punch-out site. In addition, you can look up statewide contracts by clicking on the contracts link below the search bar.

Let’s punch out to Staples.

Let’s look up copy paper. You can either click on the box displayed or:

Not every item is cheaper on this contract site – do due diligence and compare prices especially for toner. Selecting a larger quantity will not guarantee better pricing:
So one roll costs 15 cents – you would be paying 91 cents per roll if you select the dozen.

So let’s select the copy paper and the adding machine paper for this order:
Let's increase the quantities and submit order.

Once reviewed and you are ready to submit – click proceed to checkout.
You are done on the punch-out site but you have not issued a requisition yet – let’s do that by clicking the ‘Issue Requisition’ button.

On this screen we can edit the ship to location, the attention to and the accounting/expense chartfield information. Normally you have been set up with a default and can just click ‘Save and Submit’
You can follow up on your requisition by checking ‘Manage Requisitions’:

Click back to the NavBar and Navigator, eProcurement and Manage Requisitions
In order to see the Marketplace requisitions as well as the special requests – change the origin box to blank as above. If you are reviewing older requisitions blank out the date from box as shown above. Click search if the information doesn’t display. The GFM requisition we created is on top of the list REQ 0000505583 – we could have changed the requisition name on the submit screen but it is not necessary.

On the right hand side there is a box with the words “Select Action” click on it. You can select to view approvals, cancel the requisition, check budget (Procurement will do this once approved), edit – although you cannot change the quantities or items for a GFM requisition but if the shipping address is incorrect or a different budget should be used - you can edit those. You can view the cycle status of the requisition and view a print.

This is the cycle for our requisition:

![Requisition Cycle](image)

We are still in the beginning of the requisition cycle and only the requisition and approval stops are highlighted. If we purchased an asset – a single item in the amount of $3000 or above then the inventory stop would come into play and once
the purchase order stop is in color you can look up the purchase order number. Once the items come in and an invoice has been processed the invoice and payment stops with highlight as well and you can review payment information.

If you click to view a print with distribution details then this information will display:

<table>
<thead>
<tr>
<th>Business Unit: 930000</th>
<th>Requester: BBURNS</th>
<th>Requested By: Burns, Barbara</th>
<th>Status: Pending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition: 0000505583</td>
<td>Entered Date 5/3/18</td>
<td>Entered By:</td>
<td>Currency: USD</td>
</tr>
<tr>
<td>Requisition Name: 0000505583</td>
<td></td>
<td></td>
<td>Requisition Total: 281.70</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Line: 1</th>
<th>Item Description: Staples Adding Machine Roll Tape, 2 1/4&quot; x 150 ft, 140</th>
<th>Quantity: 6.0000</th>
<th>UOM: RL</th>
<th>Line Total: 0.90</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ship Line: 1</td>
<td>Attention: Pam Lockerman</td>
<td>Ship Via: VENDOR</td>
<td>Shipment Quantity: 6.0000</td>
<td>Shipping Total: 0.90</td>
</tr>
<tr>
<td>Address: Middle GA State University</td>
<td>1100 Second Street S.E.</td>
<td>Cochran GA 31014</td>
<td>United States</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dist</th>
<th>Status</th>
<th>Location</th>
<th>Qty</th>
<th>POT</th>
<th>Amount</th>
<th>GL Unit</th>
<th>Account</th>
</tr>
</thead>
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<tr>
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<td>RECEIVING</td>
<td>6.0000</td>
<td>100.00</td>
<td>0.90</td>
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<tr>
<td>Dept</td>
<td>Fund</td>
<td>Program</td>
<td>Class</td>
<td>Budget Ref</td>
<td></td>
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</tr>
<tr>
<td>166016019</td>
<td>10500</td>
<td>11200</td>
<td>11000</td>
<td>2018</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open QTY</td>
<td>Open Amt</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.0000</td>
<td>0.0000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

GL Base Amount: $0.90 | Currency: USD | Sequence: 0 | Capitalize: N

<table>
<thead>
<tr>
<th>Line: 2</th>
<th>Item Description: Hammermill Copy Plus Copy Paper, 8-1/2&quot; x 11&quot;, 92 Bright, 20 LB, 10 Reams of 500 Sheets</th>
<th>Quantity: 10.0000</th>
<th>UOM: CRT</th>
<th>Line Total: 281.80</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ship Line: 1</td>
<td>Attention: Pam Lockerman</td>
<td>Ship Via: VENDOR</td>
<td>shipping Quantity: 10.0000</td>
<td>Shipping Total: 281.80</td>
</tr>
<tr>
<td>Address: Middle GA State University</td>
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<td>100.00</td>
<td>281.80</td>
<td>830000</td>
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</table>

GL Base Amount: $281.80 | Currency: USD | Sequence: 0 | Capitalize: N
Creating a Special Request Requisition

let’s not click this quite yet

Let’s go through a checklist first:

1. I have a quote in pdf format ready to attach

2. I know what I am purchasing and I have looked up the Category/Commodity aka NIGP Code
   a. http://ssl.doas.state.ga.us/PRSapp/PR_nigp_list.jsp?whereFrom=public
   b. Or go to the Procurement Office website and click on NIGP Code Directory (do not look up NIGP codes in PeopleSoft – slow process and you do not see all the necessary information to choose the correct code
   c. Check with the Procurement Office if you are uncertain which one to pick

3. I know my supplier ID and the supplier is in the system
   a. If not let’s see if the supplier is in the system
      
      If we cannot find the supplier in our system – let’s contact the supplier and ask for their tax ID before we send them the supplier registration form to complete. The name of the supplier’s business and how it is listed with the Secretary of State can differ.

      Note: No purchase can be created from a requisition without a valid supplier ID

4. I have reviewed the order of precedence and other purchasing regulations – amount does not require the bid process, I am using the correct mandatory statewide contract or no contract exists (check for MGA contracts) and I am ready to enter the special request requisition.

Now we are ready to click the Special Requests button.
The line description should be in line with the category code chosen. Unit of measure – please do not use the following: USD or Lot. We are already paying in US currency so the unit of measure should not be USD. In very rare instances is lot the correct unit of measure – e.g. a lot of shirts – is not a ‘lot’ unit of
Please see above for the fields that require information. You can enter additional lines, but please make sure that you use one requisition for one supplier and do not order different items from multiple suppliers. The follow-up would be exponentially harder. Procurement will not process a requisition that is to go to multiple suppliers. This is a MGA rule based on past experience.

Let’s leave it as one line and after we entered the information click ‘add to cart’. The screen above displays and we can click ‘checkout’.

Now the screen is the same as previous seen for a GFM requisition, but this time we need to attach our quote:
Let’s see if you can spot a cartoon bubble under the word ‘Comments’. This is the only place that the approver can see the attachment on the approval screen.

Click on the bubble and add your attachment

Once done you will be returned to the previous screen. Make it a habit to verify the chart field / accounting /expense information. The NIGP or Category code triggers the expense account but not always correctly. Click on the triangle to the left of the line and verify the fields by clicking again on the triangle next to the accounting line.
Most common expense codes are:
714100 – Supplies and materials
714102 – Lab Supplies
714111 – Shipping and Handling coincides with NIGP code 96286
714114 – IT Supplies
714120 – Supplies and Materials other
715100 – Labor – coincides with NIGP codes beginning with the number ‘9’
714106 – Printing
742100 – only for GCI letterhead and envelope printing
714125 – should only be used by Student Activities
727100 – other operating expense
727110 – Registration fees – coincides with NIGP 96364
727120 – Subscriptions – only periodicals
727130 – Memberships – coincides with NIGP 96348
753100 – contracts - many sub-contracts mostly used by Plant OPS
753112 – contracts – charter bus services
753190 – misc contracts – for Student Activities
751110 – per diem and fees
751108 – consultants – look in the 7511 range for the best match
Looking up a supplier in PeopleSoft

In order to find a supplier ID – we return to the NavBar and Navigator and then click on Suppliers:

Let’s click on Supplier 360 and this screen will display:

In order to obtain any results, we must change the SetID from 83000 to Share. Please note that we no longer enter our suppliers in the PeopleSoft system, but that this is done by Shared Services for USG institutions that have consolidated. So if another USG institution has used the supplier – it should be already in the system unless they are the Research institutions or have not gone through consolidation yet.

Tips on looking up suppliers:

Change the name from Equal to – to Contains. Don’t provide too much information. You can narrow the search meaning don’t include the word Inc. – you don’t know if they are listed as Inc. or Inc without the period.
If the name search does not provide results – try the address by just entering the numbers of the street address or P.O. Box. Please keep in mind that this is not error proof. I am aware of one supplier who resides at the same address but does have two different companies which we both use.

The best and error-proof way is to look up a supplier by the Tax identification number also know as FEIN.

If you encounter problems, contact the Procurement office and we will try to help. If we cannot find the supplier in the system then they will need to complete the supplier registration form and submit it to Shared Services.

Please note a W-9 is not sufficient. However a foreign supplier will not need to complete the supplier registration form but has to submit a W-8ben form.